System Development Lifecycle (SDLC) Workgroup Charter

<table>
<tr><td colspan="4">1. Workgroup Definition</td></tr>
<tr><td>Workgroup Name:</td><td colspan="3">System Development Lifecycle (SDLC) Process Improvement Workgroup</td></tr>
<tr><td>Chair Person:</td><td>Beau Garcia – NC Department of Insurance</td><td>Meetings:</td><td>1st Friday of each month, 9 - noon</td></tr>
<tr><td>Start date:</td><td>June 21, 2010</td><td>End date:</td><td>TBD</td></tr>
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Workgroup Purpose? (Describe the business issues being addressed and what are the business goals/objectives to be attained)

Background

Results from the 2009 EPMO Customer Satisfaction Survey indicated that a workgroup to streamline processes for the various project types would be beneficial and improve project results. An example comment is as follows: "The process needs to be more streamlined – combine deliverables, simplify the review process to speed it up and help the PMs improve results"

Purpose

The workgroup was created to (1) recommend best practices for IT projects (custom software development, Infrastructure, GOTS, COTS, etc) that use agile and waterfall methodologies and (2) share knowledge across state agencies through formal education and other informal processes.

Business Issues
(1) Gate approval process is inflexible and takes too long
- Different types of projects don't fit into the "one size fits all" approach we have today
- Agile methods do not fit into the gate approval process and PPM tool
- The gate approval process is difficult for many agency PMs to master (for any SDLC) and it is more difficult when agile or iterative approaches are used
- Gate approval artifacts are challenging to produce, especially when the project work is agile or iterative
- We should focus more energy and dollars on project on work that adds value, keeps projects on track and ensures project success
- Difficulty using the EPMO Staffing and Financial Plan template
- EPMO Project Management Advisors and project manager expectations should be clear and consistent
- State approver expectations at gate review are not always clear to agencies
- State Approvers take too long to review and signoff, or provide feedback for what may be needed before they will signoff.

(2) Each project reinvents the wheel

- State agencies need a way to collect, share and leverage project assets (e.g. standard templates, generic work breakdown structures, historical information, repository of completed deliverable examples, etc.)

- Agencies need visibility to see what other agencies have already done and plan to do (projects, applications, services, tools, software licenses that could be leveraged, etc.) in order to reduce cost and repetitive effort at a statewide level.

(3) Technical Architecture Reviews are not clear, especially for agile projects

The Technical Architecture System Design Document (TASD) and review process needs improvement and clarity – agencies are not clear on what the A&E area is really looking for.
Goals/Objectives
- Engage all key stakeholders to develop agreed upon processes that will improve the speed and efficiency of the statewide gate approval process through such means as published templates with clear guidelines/instructions, with samples that illustrate these best practices.

1. Workgroup Definition

Workgroup Approach? (How will work be accomplished?)

1. Group is empowered to make decisions and work together toward a common purpose
2. EPMO supports the work group as desired with Project Management Advisory Group (PMAG) checkpoints, status updates, charter/rules of engagement, periodic updates to agency CIOs (CIO Council), etc.
3. The team will meet monthly for three hour sessions in work group meetings, plus some potential for undetermined work in between meetings, based on availability and willingness of group members to commit this time
4. Decision making should be collaborative and each member has input. The Chairman will poll members for ideas and thoughts. . A quorum must be present in order for the group to make decisions. A quorum currently stands at 4 agency representatives and 1 EPMO representative. Each team member should have 1 backup for when they are not available to attend.
5. Team members will take turns serving as Scribe performing administrative duties such as agenda preparation and note taking. The Scribe office will be filled by the same individual for two meetings. Then a successor will be named (based on volunteer selection or decree by currently reigning Scribe if no one freely steps forward to serve.)
6. Group members take responsibility for tasks and decide how to meet requirements
   a. Group develops a charter or set of rules that describe what is expected of each member.
   b. Charter explains what the group expects to accomplish together with deadlines for accomplishing their purpose.
7. If problems arise during the course of an initiative, group members work together to provide solutions, if desired or necessary Project Management Advisors (PMAs) can assist with problem resolution.
8. We assume that there is no urgency to complete deliverables on a predetermined schedule. We plan to take as long as we need and define our own deliverables/timeframes. Snacks will be provided on a volunteer basis via a signup sheet.

2. Workgroup Success

How will we know that the workgroup was successful? (Workgroup will establish 3 - 5 success measures, track progress and provide updates to stakeholders.

- Best practices for agile, waterfall and infrastructure projects/SDLCs are developed, adopted and provide needed flexibility in the statewide gate approval process
- North Carolina's agency project managers and CIOs have increased knowledge, recognition and awareness of agile software development methods and principles
- Better understanding of expectations for technical architecture reviews and improved collaboration between agencies and A&E
- Gate approval processes take less time to complete and work well for different types of projects and SDLCs
- Sample templates and checklists are available and accessible so that each project does not have to reinvent the wheel
- Mechanisms for continuous improvement are in place to keep momentum going after the work group completes its charter.

How can we measure success?

Ask survey/polling questions before and after to capture metrics on how long people spend getting ready for gates. For example: Survey Architecture & Engineering group for trigger questions and details they are looking for to determine time it takes to approve versus going back and forth. Run report showing gate approval times before and after implementation of approvals.

What are the key deliverables of the workgroup?

Process descriptions/checklist for each type of project (infrastructure, custom software development) and methodology (agile, waterfall) ~ 4 total

NOTE: Priority for developing process descriptions/checklist: (1) Custom software development project using agile method (2) Infrastructure project using both methods (3) Custom software development project using waterfall.

Make recommendations to handle the following:
- Clearly articulate differences between agency discretion and statewide gate approval requirements
- Strive for consistency between PMAs and QA team in EPMO
- Define minimum required deliverables (may vary by type of project) and encourage agency PMs to use this information for gate reviews and RFPs
- Streamline architecture reviews overall and improve architecture deliverable template (TASD should have fill in the slot templates not entire blank pages of narrative with unclear expectations for content)
- Streamline templates and gate approval process

Items out of scope

Overall issue of where to store, access and share project assets is not within the groups' scope

It was agreed that the work group will not pass recommendations through other groups for pre-screening. Our assumption is that this group is empowered to make independent recommendations for improvements/new

2. Workgroup Success

processes per our charter. Results will be funneled through EPMO and PMAG channels for feedback, review and approval.

Key Dependencies

IT Project oversight legislation and statewide architecture requirements must be followed.

Gate approvals and workflow will continue to be managed via the PPM Tool.

Agency PMOs could impact adoption of work group recommendations (four of the largest agencies with PMOs are already participating on the work group, so agency PMO resistance is expected to be minimal).

Constructive engagement with the A&E team will be essential (plan to invite Doug Banich in to present architecture approval process as soon as we are able to).

Need to engage OSBM to determine best practices for ensuring timely approval of funding for projects.

3. Workgroup Team Members

Team Member	Agency	Office Phone	Office eMail
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4. Notes